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18 December 1970

MEMORANDUM FOR: Deputy Director of Personnel for  
Special Programs

SUBJECT : Program Call: Fiscal Years 1973 - 1977  
Retirement Affairs Division

A. Progress Toward Current Objectives

1. General Objectives

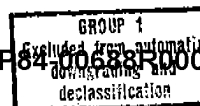
The general objectives of Retirement Affairs Division are to continue to provide full and complete individual services to Agency personnel in their preparation for retirement, processing for retirement and retirement life after retirement (maintenance of benefits to annuitants, survivor-annuitants and post-retirement job search assistance for those seeking employment). The general objectives are being met through "on-going" improvements in our employee retirement information program (i. e. acquisition of "hand-out" literature, individual counsel, seminars, etc.) and redirection of our available staff to changing priorities as we anticipate requirements.

2. Specific Progress On Primary Objectives

(a) Increased Client Load in Number Of Persons  
Processing For Retirement

In our Program Call for FY-1972-1976, RAD cited the obvious need for additional staff authorization for our Retirement Operations Branch which is responsible for all statutory (i. e. non-optional) processing requirements for retirement and on-going administrative services to CIARDS annuitants and survivor annuitants. The then currently assigned staff was already over-extended with staffing allowances based upon 1967 work-load

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statistics. Prospects for an increase in ceiling before FY - 72 were not promising although some relief was possible through adjustments in other OP ceiling allocations.

In late summer 1970, the Office of Personnel accomplished the transfer of five ceiling allowances from other OP components to ROB/RAD which provides RAD with a capability to adequately meet out basic functional requirements now and as projected into the FY - 1973-1977 time period.

(b) Voluntary Investment Plan

RAD in conjunction with the Offices of Finance and Computer Services have completed the development of the basic administrative systems and internal procedures essential to the implementation of the Voluntary Investment Plan in late Fiscal Year 1971.

(c) Non-Staff Annuity Program

RAD has been working with Contract Personnel Division/OP in developing basic concepts for the administrative systems and procedures which will be required to institute the Non-Staff Annuity Program. At this writing legislation is under consideration in the Congress which if passed into law will permit Federal employees covered by Social Security to be given Civil Service Retirement credit for those periods of service under Social Security. Passage will preclude the need for purchase of individual annuities but will create a considerable increase in ROB/RAD's civil service retiree clientele. Approximately [REDACTED] "on-duty" non-staff personnel will be covered plus an unknown number of eligibles who retired since 1955 who

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would be eligible upon their request for recomputation of their annuities.

B. Objectives Fiscal Year - 1973-1977

The primary objective is to continue to provide full retirement related services to an increasing number of eligibles for retirement and the cumulative build-up of CIARDS annuitants and survivors.

Administration of the Voluntary Investment Plan and the Non-Staff Annuity Program will have been routinized by FY-1973 and well integrated into the normal functions of RAD.

C. New Programs

1. Voluntary Investment Plan

The primary objective in establishing the Voluntary Investment Plan is to make it possible for early and mid-career employees to participate in a long term supplemental savings program which will come to fruition in the same time period as their retirement. This adjunct to retirement income should greatly reduce the financial problems such as are encountered by many of our present generations of retirees.

In the absence of a Plan of this type we must anticipate a continuation of our past experience of reluctance of many of our personnel to retire at the point in time management wishes them to terminate service.

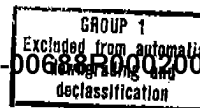
By FY-1973 we anticipate that the number of participants in the V.I. P. will have "leveled-off" at between [REDACTED] members.

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2. Non-Staff Annuity Program

The end purpose of instituting this program is to provide

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our non-staff personnel who have performed careers in an "employee" relationship with the Agency, an appropriate annuity upon retirement.

D. Significant Changes In Existing Programs

RAD anticipates a steady increase in the retirement related service requirements with peak loads impacting in the FY - 1973-1977 period. Of particular concern will be the ever increasing numbers of CIARDS annuitant and survivor cases which will accrue by this period. [REDACTED] is expected [REDACTED]

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E. Resources Required

1. Detailees

RAD assumes that four detailees, one from each Directorate, will continue to be available to perform the pre-retirement counseling function.

2. Voluntary Investment Plan

The initial operating activities and administration of the Voluntary Investment Plan in FY - 1971 will be absorbed by the presently assigned staff of RAD. In FY - 1972 however, a grade GS-07 position will be required to process participant enrollments, withdrawals, change of Plan requests and maintenance of participant files. Work load requirements for servicing this program in the FY - 1973-1977 period are difficult to ascertain at this time.

3. Annuitant, Survivor and Non-Staff Program

In Fiscal Year 1972 we will need a grade GS-05 clerk-typist to provide clerical support to the annuitant, survivor and Non-Staff Section of Retirement Operations Branch/ROB.

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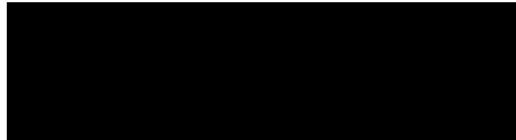


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4. Possible Reductions In Staffing Requirements - FY - 1973-1977

We do not anticipate any diminution of the pregressive increase in the normal work-loads of RAD for the foreseeable future through FY - 1977. By internal management of our current resources we expect to be able to cope with the anticipated increases except as cited in paragraphs E-2 and 3 above.



Chief, Retirement Affairs Division

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